

CHANNEL  
**MARKETING**

Make a deeper impression  
wherever clients see you.

Our platform is built for the experienced Advisor looking to improve their current RIA platform, or as an operational solution for a high caliber professional thinking of going independent and seeking a seamless transition.

**CONTACT**

6005 Hidden Valley Road, 290  
Carlsbad CA 92011

**Axxcess Wealth Management, LLC**

An SEC Registered Investment Advisor.

866-217-5607

# CHANNEL MARKETING

AXXCESS PLATFORM

What are your managers saying about the markets? Policy? The future?



**Tailored by you for your clients,  
delivered by us.**

Channel Marketing delivers advisor and firm messaging, alongside engaging, relevant manager content, deliverable to your clients directly via their client portal, email newsletter, blog post, social media and more...

All with just a few clicks of your mouse.

## CLIENT EXPERIENCE

Value is defined through your clients' eyes.

Channel Marketing elevates your communications strategy. Rather than sending your clients generic articles or general market updates, Channel Marketing delivers relevant content to your clients that is unique to their interests and allocations.

Axxcess Platform curates content and insights from some of the best money managers in the country, to help you communicate your value and differentiate your brand.

AXXCESS HELPS YOU IMPLEMENT YOUR DIGITAL MEDIA AND MARKETING STRATEGY BY LEVERAGING TIMELY, UNIQUE CONTENT WRITTEN BY THIRD PARTY MANAGERS AND STRATEGISTS THAT MAKE UP THE COMPONENTS OF YOUR PORTFOLIO STRATEGIES.

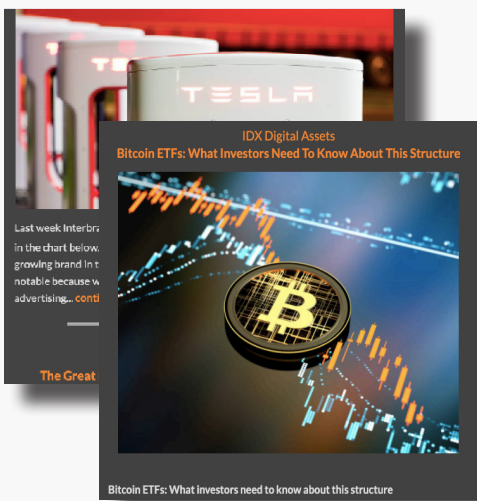
**CHANNEL MARKETING IS  
A COMPLETE ECOSYSTEM  
BUILT TO COMMUNICATE  
EFFECTIVELY WITH YOUR  
CLIENTS.**

CHANNEL MARKETING  
AXXCESS PLATFORM

# MAKE A DEEPER IMPRESSION

WHEREVER CLIENTS SEE YOU

Content is updated dynamically based on your preferences. Curate content specific to your client segmentations.

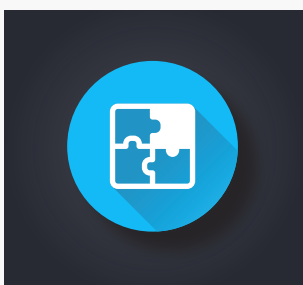


## CHANNEL MARKETING

PRODUCE CONTENT UNIQUE TO YOUR BUSINESS

**AXXCESS PLATFORM'S MARKETING TEAM WILL HELP YOU END TO END.**

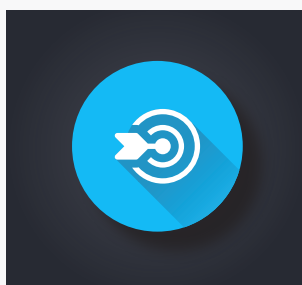
Select from the curated content that managers publish weekly. Axxcess' team will build your digital marketing materials, design your templates, organize your distribution strategy, implement, and track your results.



### STRATEGY

Foundational

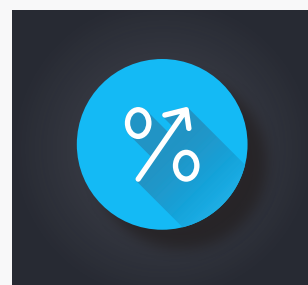
Your marketing and communication strategy is an extension of your firm's vision and business goals. Implementing your strategy is highly resource dependent. You need people, time, and money to implement any strategy successfully.



### TARGET & TAKE ACTION

Implementation

Progress towards your overall vision, including growth and retention goals, require specific, attainable, and measurable, actions. Channel Marketing allows you to segment and deliver relevant content by outsourcing implementation to the Axxcess Platform marketing team.



### MESSAGE & MEASURE

Amplification

The true differentiator for Channel Marketing is the content. You can communicate your value, while featuring the unique investment views of the strategists that your clients' portfolios are allocated with.

# PRICING


## CHANNEL MARKETING

Make a deeper impression  
wherever clients see you.

### Our Plans


NURTURE AND EXPAND YOUR BRAND WITH AXXCESS CHANNEL MARKETING

All of our plans include an individualized marketing strategy, your own branded design + unlimited access to content from the sleeve managers of your choice via the Axxcess Hub.




\$200  
month

MAKE A DEEPER IMPRESSION WITH YOUR CLIENTS AND PROSPECTS WITH CONSISTENT, PERSONALIZED COMMUNICATION



\$400  
month

EXPAND YOUR REACH PAST YOUR CURRENT CLIENT BASE WITH MONTHLY NEWSLETTERS + PERSONALIZED BLOG POSTS



\$700  
month

MAXIMIZE YOUR POTENTIAL AND CHANNEL BRANDED CONTENT ACROSS ANY SOCIAL MEDIA PLATFORM

<b>Personalized Design</b> <i>Your branding, your style</i>	Curated Client Portal	Curated Client Portal	Curated Client Portal
<b>Performance Reporting</b> <i>Data to show you your marketing is working</i>	Newsletter/Email	Newsletter/Email	Newsletter/Email
<b>No Contract</b> <i>Cancel at any time at no cost to you</i>	—	Blog	Blog
<b>\$500 One Time Set Up Fee</b> <i>Waived if you enroll before 2/15/2022</i>	—	—	Social Media Posts <i>Facebook, Instagram, LinkedIn</i>  <b>Added Bonus Feature</b> <i>SMS Campaigns</i>

Initial cost is the monthly subscription fee (billed quarterly). To enroll multiple advisors within a firm utilizing the same content incurs a \$15 additional monthly fee per advisor.

### Plans

#### At a glance:

- Our Newsletter Plan offers a monthly newsletter uploaded to your clients' portals, as well as sent to them directly via email.
- Our Blog Plan offers a monthly blog post to your website, in addition to an email newsletter and client portal upload.
- Our Social Media Plan provides a monthly social media post to your LinkedIn, Instagram, Facebook, and Twitter, in addition to a blog post, client portal upload, and email newsletter, distributing your hand selected content across every platform.



### STRATEGY

Create your vision, business rationale, & execution plan.



### TARGET MARKET

Segment your clients and prospects by interests, allocations, and demographics.



### MY INSIGHTS

Unlimited access to the Channel Marketing content library.



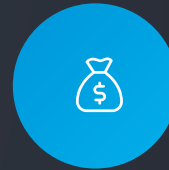
### ACTION

Personalized marketing communications calendar, template design, and delivery.



### ENGAGE

Expand your brand outreach past your current client base by engaging across multiple channels.



### MEASURE

Clicks, opens, views, time optimizations, likes, and more with data analytics.

# HOW DOES IT WORK?

Marketing is an important business discipline in any industry, and financial advising is no different. Marketing to your current client base strengthens business relationships, reiterates your value, & eases client anxieties about their investments. Regularly communicating with your current client base increases the likelihood of client referrals, which is proven to be the most common and effective way to grow your practice. Channel Marketing takes into account your individual client interests and allocations, in order to efficiently and effectively market quality content. Marketing to your prospective client base is the only way to grow your practice independent of client referrals, and can only be done by maintaining an online presence. In fact, 66% of people research an advisor or firm online before contacting them. Through our Blog and Social Channel Marketing packages, we will maintain your online presence for you, to amplify your brand across every channel.

## CONTENT :

The media content included in your custom newsletter will be articles, manager insights, market forecasts, strategy updates, executive commentary, and more, provided by the sleeve managers your clients are invested with.

## HOW IS IT DIFFERENT ?

Channel Marketing provides a content experience that is truly unique to your clients' financial needs. As opposed to other generic marketing services, channel marketing cuts out the white noise symptomatic of media over production, allowing your clients to only receive information directly pertaining to their interests and investments.

## HOW DO I ENROLL ?

To enroll, simply go to <https://hub.axxcessplatform.com/enroll/>, and fill out the enrollment form.

## CAN I CANCEL ?

Yes! Each of our plans are non-contractual, allowing you to cancel our service at any time appropriate to you.

# COMPLIANCE APPROVED?

Marketing content available on the Axxcess Hub is curated from public postings made by managers with strategies on the Axxcess Platform. Content is reviewed and approved by the managers' own compliance team before posting, and all manager content has been approved for public use by the managers. Axxcess Platform technology offered through our Channel Marketing platform allows for local compliance officers to review, comment, revise, and approve. Any communication with the public must be reviewed and approved by your firm and compliance officer before distribution.

# GETTING STARTED

## WITH CHANNEL MARKETING

Our Channel Marketing service is offered in three different plan types, Newsletter, Blog, and Social Media. Our Newsletter Plan offers a monthly newsletter uploaded to your clients' portals, as well as sent to them directly via email. Extend your marketing past your current client base with our Blog Plan, which provides a monthly blog post to your website, in addition to an email newsletter and client portal upload. Finally, our Social Media Plan provides a monthly social media post to your LinkedIn, Instagram, Facebook, and Twitter, in addition to a blog post, client portal upload, and email newsletter, distributing your curated content across each platform.



What better way to start the new year than to take your business to the next level?

Together we will help you set goals and develop a vision to nurture your current business relationships and create new ones.



Let Axxcess help you make this your most successful year as an advisor yet.

Short on time? Let the marketing professionals do the bulk of the work for you by creating templates, marketing schedules, and delivering quality information to your clients on your behalf.



Communicate your value, amplify your brand and deliver personal messages to ensure your success as an advisor.

Like it or not, we live in a fast-paced world and work in an industry that is ever-changing. Deliver quality content that has relevant insights and tangible takeaways.

**1** You will first fill out our enrollment form accessible at <https://hub.axxcessplatform.com/enroll/>, in which you will select the managers, strategies, and topics of interest to your clients.

**2** We will then set up a call with our marketing team to discuss your overall vision and goals for your practice, as well as select and design your email template. Our marketing team will take it from there!

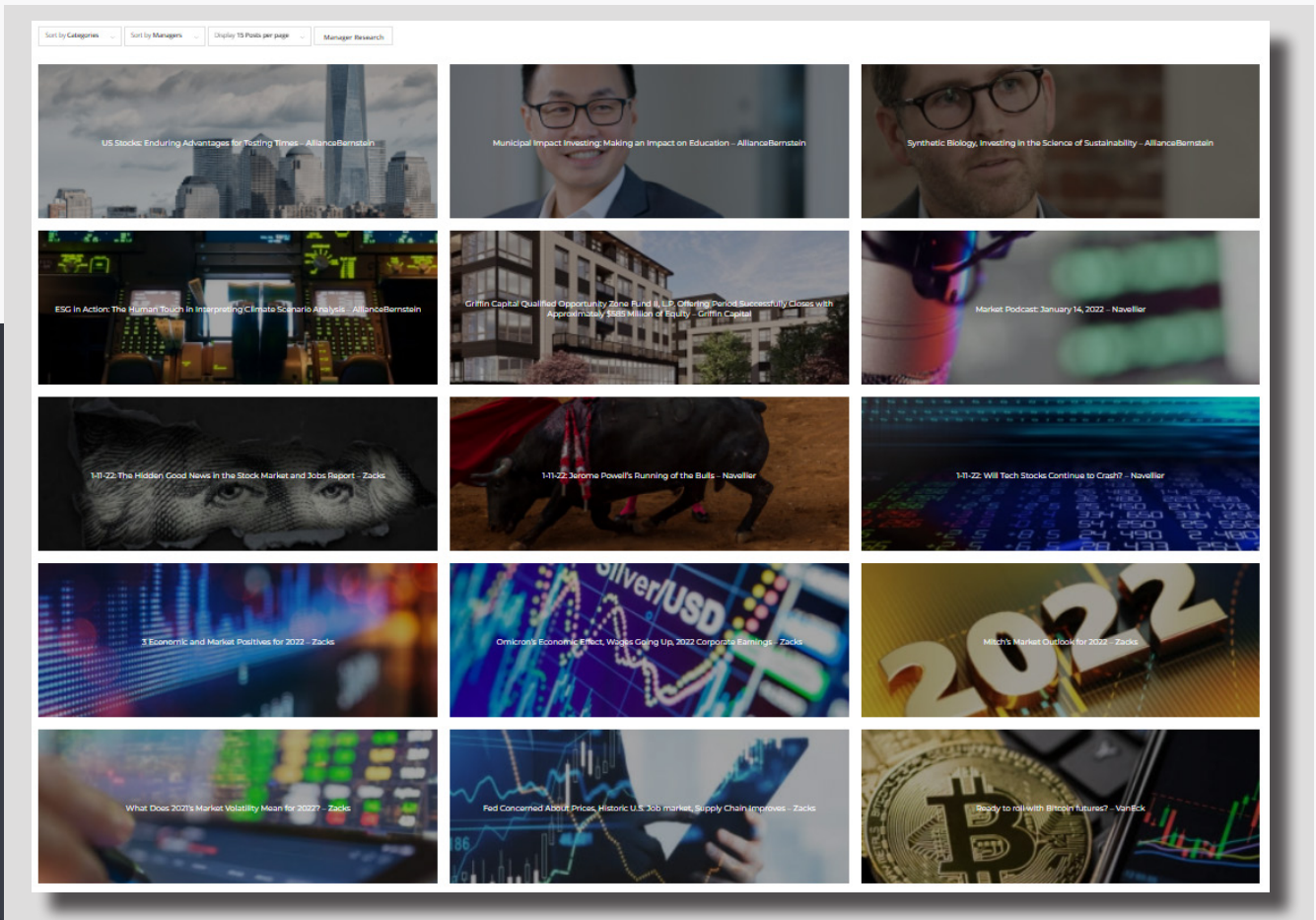
**3** You will receive a newsletter complete with content pertaining to your selections made during enrollment. Add your personal message (if desired), and our marketing team will channel your marketing materials across each platform included in your plan.

# CLIENT EXPERIENCE

Value is defined through your clients' eyes.

# CHANNEL MARKETING

## AXXCESS PLATFORM



**POSTS**

- US Stocks: Enduring Advantages for Testing Times - AllianceBernstein
- Municipal Impact Investing: Making an Impact on Education - AllianceBernstein
- Synthetic Biology, Investing in the Science of Sustainability - AllianceBernstein
- ESG in Action: The Human Touch in Interpreting Climate Scenario Analysis - AllianceBernstein
- Griffin Capital Qualified Opportunity Zone Fund II, L.P. Offering Period Successfully Closes with Approximately \$585 Million of Equity - Griffin Capital

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**PACIFIC POINT**

Proposals | Insight | Documents | Tools | Updates | Planning | Goals | Admin | Logout

Comms

**ADVISOR CHECKLIST**

No active issues found

**Advisor Commentary**

Latest news and information from your advisor

11-16-21: Will the Fourth Quarter Sag or Soar? Nov 17, 2021

by Lou Navellier

The economy seems to be standing at a crossroads. After the third quarter's sub-par report, we are seeing optimistic forecasts for the fourth quarter. But the Atlanta Fed's latest GDP annual GDP growth forecast. The key question is – will we see the first quarter, or even again, like we did last year?

First, here are the key catalysts supporting the economy's strength this quarter. First, in the most recent FOMC statement, Fed Chairman Jerome Powell avoided any mention of the Fed raising key interest rates. As a result, Treasury yields maintained levels which caused many investors to put the stock market.

Second, the U.S. dollar has remained strong. China's reopening has been delayed and equity Germany's recent election is weakening. As we have reported, we expect to flow into U.S. Treasury assets.

Third, retail sales are expected to soar this holiday shopping season due to high consumer confidence as well as no pay personal income. The shortage of some key goods should not deter holiday spending, so long as consumers have money in their pockets. They will spend it on whatever is available. [continue reading](#)

PROPOSALS

- Proposal.pdf
- Proposal.pdf
- Proposal.pdf
- Proposal.pdf
- Proposal.pdf
- Proposal.pdf

**CLIENT PORTAL  
AXXCESS PLATFORM**

**EMAIL CAMPAIGN  
AXXCESS PLATFORM**

**John Jenkins, AEP®, CFP®, CFF®, BPC® - 3rd+**  
Chairman & Senior Financial Adviser Specializing In Retirement Income ...

Thank you to **Nasdaq** for featuring our latest news on the success of our fundraiser for **Rady Children's Hospital-San Diego!** This was a wonderful way to start the year: <https://lnkd.inj/y7aZ5YW>

**Asset Preservation Strategies Inc. Raises Impactful Funding for Rady Children's Hospital**  
nasdaq.com • 3 min read

Like Comment Share Send

**Generic Advisors, LLC**

Dear Client,

October was a strong month for our Generic Profiles as not only was the S&P 500 index strong, but we continue to see strong demand for the environment for relative strength strategies. One way that we gauge the environment for our strategies is by watching the performance of the relative strength leaders compared to the relative strength laggards. This can be a good indicator of the stability of trends and that comparison or spread has been strong in recent months – something we like to see. Energy and Technology were among the leading sectors for the month while Consumer Staples and Telecom were among the laggards. We did see strong performance across large, mid, and small cap stocks for the month, but large caps did lead the way. Commodities and Real Estate were also strong for the month.

Below are a few articles I selected for you based on your allocations. It's been a strong third quarter, and the optimism about what the rest of the year has in store.

All the best,  
Your Advisor

**Top Stories For You**

- NFT**
- Verify Digital Assets**
- Crypto Categories: Sweet Cornish Regional**
- Number 1 Year 2020**
- Competition at COP26**
- The Fed has Printed Itself into a Corner**
- Using Biotechnology Stocks to Help Navigate the Ongoing COVID Crisis**

Disclosures

**Watch Video**

**Other Stories You Might Like**

- Inflation II State Street**  
**The Fed has Printed Itself into a Corner**  
So, raging inflation, a U.S. Federal Reserve ("the Fed") that has finally conceded that we have an inflation problem and a new, rapidly-spreading COVID variant. What could possibly go wrong?
- COVID-19 II Navellier**  
**Using Biotechnology Stocks to Help Navigate the Ongoing COVID Crisis**  
The search to find treatments and preventive solutions to COVID-19 has focused investor attention on science and medicine, reinforcing the view that the

**Read More** **Read More**

Disclosures

**BLOG POST  
AXXCESS PLATFORM**

**SOCIAL MEDIA  
AXXCESS PLATFORM**

**How Does It Work?**

Build your campaign by selecting the topics relevant to your clients & prospects - and we will deliver it directly to them with little time required by you.

Learn More By Downloading Our Brochure

Still Have Questions? Our Will-Use-It-Or-We-Donate-It Program Will Take Care of It for You

Ready To Fund? Get Started Here

**ENROLL BY VISITING HUB.AXXCESSPLATFORM.COM OR BY CONTACTING OUR CHANNEL MARKETING TEAM: 866.217.5607**



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